

# Offline Order Emails

## Overview

When a user shops on your website, they receive an Order Confirmation email once their order is submitted. As their order leaves the warehouse, they are also sent an Order Shipped email to advise that their goods are on the way.

But what about users who *don't* order via your website? There will always be customers who prefer to chat to their Sales Rep and order with them, or those users who need to speak to a Customer Service advisor before placing an order over the phone. Good news - as long as the email address is stored in PRONTO, those customers can receive the same Order Confirmation and Shipped emails as your web users!



Please contact Commerce Vision for advice before configuring this feature in your Stage site. We can help ensure that no emails are sent to real customers during testing.

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### Prerequisites

1. In order to take advantage of this feature, your website must be running version 3.84.00+, and your Integrator must be running version 4.62.00+.
2. It's important to note that only customers marked 'Active' in CSS can receive offline order emails. See [Customer Activation](#) for more information.



## Your Order Is Confirmed

### Order Summary

Item	Qty	Price (ex GST)	Unit	Discount	Total (ex GST)
 <a href="#">Paper Mate Stick Ballpoint Pen, Medium</a> <a href="#">Code: CV225</a> In Stock	2	\$8.99	DOZE	5.00%	\$13.28
 <a href="#">Foolscap Suspension Files, Green, Recycled, 50 Box</a> <a href="#">Code: CV305</a> In Stock	1	\$29.99	BOX	5.00%	\$28.49
Subtotal (ex GST)					\$41.77
Plus GST					\$4.18
Total (inc GST)					<b>\$45.95</b>

#### Delivery Address

Default Delivery Address

1186 Toorak Road

YALBOROO

4352

#### Delivery Instructions

Test instructions

Phone: (07) 3369 3733

Fax: (07) 3891 3996

<https://bpduat.customer-self-service.com>

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## Your Order Has Shipped!

Your order has been shipped!

### Delivery Address



Default Delivery Address

1186 Toorak Road

YALBOROO

4352

### Order Summary

Item	Qty	Price (ex GST)	Unit	Discount	Total (ex GST)
 <a href="#">Paper Mate Stick Ballpoint Pen, Medium</a> <a href="#">Code: CV225</a> In Stock	2	\$6.99	DOZE	5.00%	\$13.28
 <a href="#">Foolscap Suspension Files, Green, Recycled, 50 Box</a> <a href="#">Code: CV305</a> In Stock	1	\$29.99	BOX	5.00%	\$28.49
Subtotal (ex GST)					\$41.77
Plus GST					\$4.18
Total (inc GST)					<b>\$45.95</b>

Phone: (07) 3369 3733

Fax: (07) 3891 3996

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## Enable the Functionality

1. Login to the CMS.
2. Navigate to **Advanced Content Resources**.
3. Search for the resource '**rcOrderConfirmedEmailWhereClause**'
4. Click '**Modify**'.
5. In the Resource Value field, enter '**1 = 1**'.



If you're testing this in your Stage site (recommended!), adjust the where clause to one specific test customer only. This way, orders in the Test ERP won't trigger real emails to real customers during testing!

Instead of a where clause of "1 = 1", try something like **Code = 'ABC02'** (which would apply to customer ABC02 only).

Resource Maintenance			
Search For : <input type="text" value="rcOrderConfirmedEmailWhereClause"/> <input checked="" type="radio"/> Contains <input type="radio"/> Starts With <input type="button" value="Search"/>			
	Resource Code	Language Code	Resource Value
<input checked="" type="radio"/>	rcOrderConfirmedEmailWhereClause	en-au	1 = 1
Modify : New : Delete : <a href="#">Cancel</a> : <a href="#">OK</a>			
1 records. (1 page) <span style="float: right;">1</span>			
<b>Resource Code :</b> <input type="text" value="rcOrderConfirmedEmailWhereClause"/> <b>Language Code :</b> <input type="text" value="en-au"/> <b>Resource Value :</b> <input type="text" value="1 = 1"/> <b>Description :</b> <input type="text"/>			

6. Click '**OK**' to save.
7. Now search for the resource '**rcOrderShippedEmailWhereClause**'.
8. Click '**Modify**'.
9. In the Resource Value field, enter '**1 = 1**'.

Resource Maintenance			
Search For : <input type="text" value="rcOrderShippedEmailWhereClause"/> <input checked="" type="radio"/> Contains <input type="radio"/> Starts With <input type="button" value="Search"/>			
	Resource Code	Language Code	Resource Value
<input checked="" type="radio"/>	rcOrderShippedEmailWhereClause	en-au	1 = 1
Modify : New : Delete : <a href="#">Cancel</a> : <a href="#">OK</a>			
1 records. (1 page) <span style="float: right;">1</span>			
<b>Resource Code :</b> <input type="text" value="rcOrderShippedEmailWhereClause"/> <b>Language Code :</b> <input type="text" value="en-au"/> <b>Resource Value :</b> <input type="text" value="1 = 1"/> <b>Description :</b> <input type="text"/>			

10. Click '**OK**' to save.
11. Now search for the resource '**rcOfflineOrderConfirmationEmailInvoiceDateBuffer**'.
12. Click '**Modify**'.
13. In the Resource Value field, enter the number of days to check for orders. This prevents confirmations for old orders on start up being sent. If this is set to 0 - the functionality is effectively off.
14. [Refresh the System Settings dictionary](#) to pick up the above changes. You can find instructions here - [Cache Refreshing](#).



#### Please note

If Order Shipped emails have not been enabled for your site, your offline users will only receive the Order Confirmation email. To configure Order Shipped emails, refer to this guide - [Order Shipped emails](#).

## Update Integrator Settings

1. Open the Integrator client.
2. With the appropriate site selected, click '**Settings**'.
3. Select the '**Advanced**' tab.
4. Set the '**Customer Email Record Type**' to '**E**'.

The screenshot shows the 'Advanced' tab of the Integrator Settings window. The 'Customer Email Record Type' is set to 'E' in a text box at the bottom right. The window contains various settings for the integrator, including file upload settings, integration mode, and live pricing options.

**Local Cache** | **Data Filters** | **Timing** | **ERP** | **Internet** | **Custom Tables** | **Custom Fields** | **Advanced** | **Notifications** | **Images** | **Discounts & Special Pricing** | **Documents** | **Timing Items**

**Serial Number Import**

☐ Enable serial number import from file

File Prefix :

**Other Settings**

Alternate Product Category Field :

Alternate Sort Code :

Invalid Condition Codes (default: DIYNT) :

Default Country :

System Table Types to Send :

Order Shipped Statuses :

Reviewed Quote Field :

Order Delivery Email Address Set Field :

StockPrice Field For Product Integrated Price :

Order Integration Multiline Query :

Integration Data Format :

Archive Orders From Override Date :

Online Receiving Fields :

Address Validation Field :

**File Upload Filename Character Mapping Settings**

**CSSNET 3.63# Required for this functionality**

☐ Enable

Mappings :

Integration Mode :

Live Call Compression Threshold (bytes) :  Get New Orders Timeout :  minutes (0 = no timeout)

☐ Check Invoice Reprints ☐ Integrate warranty claims ☐ Send Stock Pricing Iteratively

☐ Check Statement Reprints ☐ Integrate Supplier Invitations ☐ Use Archive Orders From Override Date

☒ Preserve Product Data ☒ Integrate Bonus Stock ☐ Send Customer Conversions

☒ Single StockPrice Query ☐ Integrate Changed Backorders ☒ Use Pronto Trans Pay By Date

☐ Include Bill of Materials Notes ☒ Log Integrator Events On Web ☐ Integrate CSSBank SteID with Receipts

☐ Show 'Send Custom Programs' Button ☐ Custom Program Before Order Confirm ☐ Disable Send of Picture Notes

☐ Integrate Pronto Custom Periods Always ☐ Custom Program Before Send ☐ Include Suffix When Loading Receipts

☐ Do not Integrate Blank Custom Notes  ☒ Set Financier Address On Orders

☐ Integrate Order Comments As Note Lines ☐ Always Send Bill of Materials ☐ Disable Integration of Stock Master Customer Fields

☐ Send Reviewed Quotes ☐ Bulk Integrate Custom Notes ☐ Integrate to Store Location table

☐ Enable Customer Product Mappings ☐ Once-off Web Quote Upload ☐ Send Customer Status And Credit Limit

**Live Pricing/Availability**

☐ Enable Live Pricing/Availability Listener

☒ Enable verbose logging  mins

☐ Enable ERP Listener 9803

Test Pricing (Integrator needs to be running in foreground mode)

Product :  Warehouse :

Customer :  Quantity :

Customer Email Record Type :

5. Select the '**Local Cache**' tab.

6. Select the '**Customer\_DeliveryAddress\_EMAIL**' table and click '**Empty Selected Tables**'. If there is no entry for this table, disregard this step.

The screenshot shows the 'Cached Tables' window with a list of tables and their record counts. The 'Customer\_DeliveryAddress\_EMAIL' table is highlighted with a yellow background and a checkmark. To the right of the table list is a button labeled 'Empty Selected Tables' with a red arrow pointing to it.

Table	Records	Locked
Table	9	False
BonusStock	405	False
CUSTOM_StockMasterExtraDetail	481	False
CategoryProduct	0	False
CategoryProduct_AlternativeCategoryNotes	2	False
ColloquialNames	7	False
Contract	10560	False
ContractProducts	106	False
Customer	108	False
Customer_DeliveryAddress_C	22	False
Customer_DeliveryAddress_DA	3	False
Customer_DeliveryAddress_DI	101	False
<b>Customer_DeliveryAddress_EMAIL</b>	13	False
DeliveryAddress	0	False
GeneralNotes_1	0	False
GeneralNotes_2	0	False
GeneralNotes_3	0	False
GeneralNotes_4	0	False
GeneralNotes_5	0	False
Product	488	False
ProductAlternatives	6	False
ProductSubstitutions	0	False
ProntoBillOfMaterials	51	False
ProntoCustomPricing	62	False
ProntoDiscount	3	False
ProntoSpecialPrice	38	False
ProntoStockPrice	470	False
ProntoStockPriceDiscount	0	False
StockSecurity	0	False
Sys Table	79	False
WarehouseAddress	9	False
custom_systemtable	13	False

7. Click '**OK**' to save.  
 8. Stop, then re-start your integrator. If you're unsure how to do this, see [Integrator - Stop and Start](#).  
 9. Once the integrator has re-started, trigger a **Send All** for '**Customer Master**'.

The screenshot shows the 'Send Now' window with a table of data. The 'Customer Master' table is highlighted with a yellow background. The 'All' button in the 'Send Now' column is circled in red.

	Last Sent (Timings)	Last Sent (Manual)	Next Send (Changed)	Next Send (All)	Status	Send Now	Manual Send
<b>Customer Master</b>	25-08-16 06:00 AM	23-08-16 04:29 PM	25-08-16 10:00 AM			<b>All</b> Changed	
Customer Transactions :	25-08-16 02:00 AM	11-01-16 08:30 AM	26-08-16 02:00 AM			All Changed	
Product Categories :	25-08-16 06:00 AM	12-04-16 10:53 AM	25-08-16 10:00 AM			All Changed	
Product Master + Pricing :	25-08-16 06:00 AM	21-06-16 04:01 PM	25-08-16 10:00 AM			All Changed	
Product Availability :	25-08-16 06:00 AM	27-10-15 10:00 PM	25-08-16 10:00 AM			All Changed	<a href="#">Set Options...</a> (11 Selected)
Product Notes :	25-08-16 06:00 AM	27-10-15 02:23 PM	25-08-16 10:00 AM			All Changed	
Product Images :	25-08-16 09:05 AM	02-08-16 09:33 AM	25-08-16 09:10 AM			All Changed	
Documents :	25-08-16 09:05 AM	07-07-14 01:46 PM	25-08-16 09:10 AM			All Changed	
Supplier :						All Changed	
Stock Supplier :						All Changed	
Discounts + Special Pricing :	25-08-16 06:00 AM	30-06-16 09:45 AM	25-08-16 10:00 AM			All Changed	<a href="#">Set Options...</a> (8 Selected)
Current Orders :	25-08-16 09:00 AM	23-08-16 02:20 PM	25-08-16 09:20 AM			All Changed	
Archive Orders :	25-08-16 02:00 AM	07-01-16 12:19 PM	26-08-16 02:00 AM			All Changed	
Custom Tables :	25-08-16 06:00 AM	21-06-16 04:01 PM	25-08-16 10:00 AM			All Changed	<a href="#">Set Options...</a> (2 Selected)
System Table :	25-08-16 06:00 AM	12-04-16 10:56 AM	25-08-16 10:00 AM			All Changed	
Receiving :	25-08-16 06:00 AM		25-08-16 10:00 AM			All Changed	
CRM :						All Changed	
Retrieve Pending Customers :	25-08-16 06:00 AM	13-06-16 11:40 AM	25-08-16 10:00 AM			Get	
Retrieve New Orders, etc :	25-08-16 09:05 AM	13-06-16 04:30 PM	25-08-16 09:10 AM			Get	

Congratulations! Now any customer with a valid email address in PRONTO'S *Delivery Email Address* field can receive order confirmation & shipped notifications! Emails will be triggered when changed 'Current Orders' integrates.

Customer Maintenance

Identifier  
 Customer: TEST Bill to: TEST Name: Test account

Transaction Balances  
 Opening Balance: 0.00  
 Current Balance: 0.00  
 Future Balance: 0.00  
 Outstanding Balance: 0.00

Tracking Dates  
 Last Sale:  
 Last Payment:  
 Account Opened: 04-AUG-2014

Credit Status  
 Credit Status: OK  
 Credit Limit: 0  
 Credit Limit Overrid:  
 Customer Stat

Address Details  
 Name: Test account  
 Address: Test Line 1  
 Test Line 2  
 Postcode: 3000  
 Phone Country: Phone:  
 Fax Country: Fax:  
 DPID:  
 #1:  
 #2:

Email Address Maintenance  
 Email Address: test.user@commercevision.com.au  
 OK Cancel

Delivery  
 Email Address  
 Multiple Delivery  
 On Forwarding Instruction  
 Statement Address  
 Fax Modem  
 Registration Details

Details  
 Housekeeping F  
 GST Ex Co

Delivery Code: Freight Code:  
 Delivery Seq: 0 Industry Sub:  
 Master Account#:

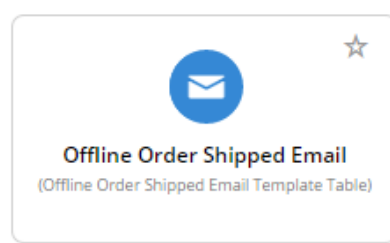
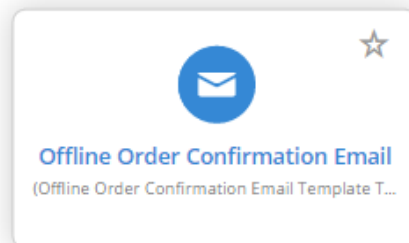
Delivery Transactions Sales Orders Aged Balance Notes Help Owe Audit Extra

Back

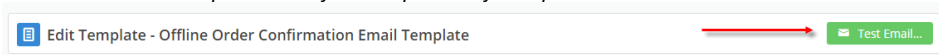
## Customising Templates

To edit the content or layout of your Offline Order Confirmation and Shipped emails, simply configure the widgets in the templates as required.

1. Login to the CMS.
2. Navigate to **Content Emails**.
3. Select the required template:
  - Offline Order Confirmation Email
  - Offline Order Shipped Email



4. Add, Edit, or Delete widgets as required.
5. Use the "Test Email..." option to verify that output is as you expect.



## Customising based on Order Source

You may wish to have a different email Subject for certain order types.

Do you have physical, Point Of Sale retail locations? For 'in person' orders, you may not want an email sent to your customer saying "Your Order Has Shipped" (because they've taken the goods with them!). A subject line of "Your Order Receipt" may be more appropriate in this scenario.

The Subject of your Offline Order Shipped email is determined by the value of the resource "rcEmailSubjectOfflineOrderShippedDefault". You can override this for different order sources, by creating a new resource for each type that requires a custom subject line. Here's how:

1. Find the **PRONTO code** for the order source you wish to customise. For example, "P" might signify a POS order in PRONTO, "-" might be internet, and so forth.
2. **Create a new resource** to act as an override for that source type:
  - a. In the CMS, navigate to **Advanced Content Resources**.
  - b. Click **New**.
  - c. In the **Resource Code** field, enter "**rcEmailSubjectOfflineOrderShipped\_XYZ**", replacing XYZ with the **PRONTO code** for your order source.
  - d. In the **Resource Value** field, enter the custom text for this order source. This will become the Subject for offline emails from this source.
  - e. Give the resource a **Description** to help you identify it and find it in searches.
  - f. Click **OK** to save.

The screenshot shows a form for creating a new resource. It has four main sections: 'Resource Code' with a text input containing 'rcEmailSubjectOfflineOrderShipped\_P'; 'Language Code' with a dropdown menu set to 'en-au'; 'Resource Value' with a text area containing 'Your Order Receipt'; and 'Description' with a text area containing 'Custom subject line for POS orders.'.

- g. Your Offline Order Shipped email subject will now display this resource value. Any source types without an override will display the value of "rcEmailSubjectOfflineOrderShippedDefault".

Now that the subject line is being overridden for this source type, you may wish to also customise the heading shown in the body of the email.

You can do this via the [Email Title Offline Order widget](#).

1. In the CMS, navigate to **Content Emails**.
2. Select the **Offline Order Shipped Email Template**.
3. In the zone 'AfterHeader' (or other zone according to your layout), add an [Email Title Offline Order widget](#).
4. Drag the widget so it sits below the original Email Title Offline Order widget.
5. **Edit** your newly added widget.
6. Enter the **Email Title** to be displayed in the body of the email.
7. Set the **Title Type** to either **Content**, or **Order** (Order will include the order number)
8. In the **Order Source Inclusions** field, enter the type you wish to display this title for.
9. In the **Order Source Exclusions** field, enter the type(s) you wish to exclude for this title.
10. Click **Save**.

The screenshot shows the configuration form for the 'Email Title Offline Order' widget. The title bar says 'Email Title Offline Order - Email Title for POS orders'. The 'General Options' tab is selected. It contains several fields: 'Description' (Email Title for POS orders), 'Layer' (All Pages), 'Email Title' (Your Order Receipt), 'Title Type' (Content Title), 'Order Source Inclusions' (P), and 'Order Source Exclusions' (S,2,-,LP). There are also icons for 'Comma separated' for the inclusion and exclusion fields.

11. Now, **Edit** the original **Email Title Offline Order** widget.
12. In the **Order Source Exclusions** field, enter the type you just customised the subject for.
13. Click **Save**.



